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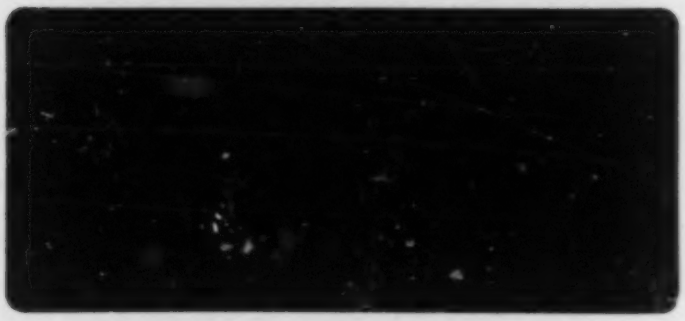

FACT FILE

Market Research Division
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Infants', Toddlers', Girls' and Boys' Wear

FAIRCHILD FACT FILE

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INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR

Market Trends

The market for infants', toddlers', girls' and boys' wear has clearly come of age. In 1984, an estimated $23.1 billion was spent by consumers for this merchandise, a 10.1% gain over 1983 expenditures. According to trade sources, purchases of girls' and infants'/toddlers' wear accounted for sales of $17.1 billion last year, an increase of 9.6% for the year. Purchases of boys' wear totaled $6.0 billion, up 11.4% in 1984.

A key factor in the growth of this market is the mini baby-boom now taking place as the baby-boom generation has children of its own. The U.S. population of those under 16 years of age is projected to increase 3.4% by 1990.

Not only are more babies being born but they are being born into increasingly affluent two-income families. Since today's parents are waiting longer to have children, they are further into their careers and, subsequently, have more discretionary income to spend on their children. Furthermore, the number of first children born to a household--for whom parents will spend as much as a third more than on later children--is at a near record level.

This rising level of demand for children's wear is creating increasing competitiveness among retailers. The proliferation of off-price children's apparel stores, such as Kids "R" Us, has forced department stores to lower their margins in response. These off-price outlets, offering everyday low prices of 15-30% off what their conventional competition is offering, are demanding--and receiving--first-line fashion merchandise from manufacturers. Family-oriented off-price stores, such as Marshalls, have their own clearly defined children's wear departments, including private label offerings. Their sales, too, come at the expense of mass marketers who are forced to become more discount-minded.

As far as the merchandise itself is concerned, today's children place a premium on style, while their mothers rate quality very high. The result is fashion-oriented, upscale clothing more like adult wear. MTV (Music Television) has had a significant impact on kids wanting trendy apparel. In addition, the fitness boom is spurring sales of activewear for children, with licensing a key element in this area. Parents look for brand names in children's wear that they recognize from their own clothing purchases. This is becomming easier to do as more designers, including Liz Claiborne, Ralph Lauren and Norma Kamali, enter the children's market.

Licensing has continued to be a key feature in the merchandising of children's apparel. Sales of licensed products of all apparel and accessories reached $15 billion in 1984, with children's wear accounting for a considerable share of this. Retailers now seek out licensed products with a little more care than in past years. They are more conscious of the transient nature of these items and wait longer than before to determine the popularity of a given T.V., movie, or comic book personality. This element of caution has created a greater reliance on proven, quality licensed products, such as Disney characters.

AT THE MANUFACTURER LEVEL

GENERAL INDUSTRY STATISTICS

The U.S. Bureau of the Census has just issued its final 1982 census of manufactures findings covering manufacturing activity in the children's wear industry. A complete census is conducted every five years. All dollar figures included in this report are at prices current for the year specified and, therefore, unadjusted for changes in price levels. The inflation that has occurred over the 1977-1982 period should be taken into consideration when making comparisons.

The children's dress & blouse segment of the industry was the largest and fastest growing in 1982. Its value of shipments jumped 71.9% from 1977 on the strength of 7.1% more establishments. The number of establishments manufacturing children's coats & suits fell by nearly a third in 1982 while those making children's outerwear, not elsewhere classified, declined 8.5%. Both of these segments had reported increases in their value of shipments, however, with gains of 11.1% and 53.4%, respectively.

Children's Dresses & Blouses (SIC 2361*)

	1982	1977	% Change 1982/1977
Number of companies	490	455	+ 7.7%
Number of establishments, total**	556	519	+ 7.1
Number with 20 or more employees	391	374	+ 4.5
Employees, total (thous.)	37.7	35.2	+ 7.1
Production workers (thous.)	32.4	30.4	+ 6.6
Payroll (mil. $)	$ 357.3	$ 228.4	+ 56.4
Value added by manufacture# (mil. $)	745.9	444.6	+ 67.8
Value of industry shipments## (mil. $)	1,417.7	824.7	+ 71.9
Capital expenditures, new (mil. $)	11.6	6.4	+ 81.3

Children's Coats & Suits (SIC 2363*)

	1982	1977	% Change 1982/1977
Number of companies	71	108	- 34.3%
Number of establishments, total**	81	120	- 32.5
Number with 20 or more employees	51	70	- 27.1
Employees, total (thous.)	6.3	6.7	- 6.0
Production workers (thous.)	5.5	5.7	- 3.5
Payroll (mil. $)	$ 52.6	$ 45.8	+ 14.8
Value added by manufacture# (mil. $)	103.6	90.2	+ 14.9
Value of industry shipments## (mil. $)	193.1	173.8	+ 11.1
Capital expenditures, new (mil. $)	1.4	1.3	+ 7.7

(continued)

GENERAL INDUSTRY STATISTICS

Children's Outerwear, n.e.c. (SIC 2369*)

	1982	1977	% Change 1982/1977
Number of companies	279	307	- 9.1%
Number of establishments, total**	332	363	- 8.5
Number with 20 or more employees	216	242	- 10.7
Employees, total (thous.)	27.6	29.3	- 5.8
Production workers (thous.)	23.3	25.1	- 7.2
Payroll (mil. $)	$ 262.8	$ 184.9	+ 42.1
Value added by manufacture# (mil. $)	597.8	344.4	+ 73.6
Value of industry shipments## (mil. $)	1,102.4	718.8	+ 53.4
Capital expenditures, new (mil. $)	17.1	6.7	+155.2

* Manufacturers are classified by industry under the Standard Industrial Classification (SIC) system determined by the principal product made, shown below:

SIC 2361 comprises establishments primarily engaged in manufacturing girls', children's and infants' dresses, blouses, waists, and shirts, cut and sewed from purchased woven or knit fabric.

SIC 2363 covers establishments primarily engaged in manufacturing girls', children's and infants' coats and suits, cut and sewed from woven and knit fabric.

SIC 2369 includes establishments primarily engaged in manufacturing girls', children's and infants' outerwear, not elsewhere classified, cut and sewed from purchased woven or knit fabric. It covers items such as tops, playwear, swimwear, robes, skirts, headwear, etc.

NOTE: Separate industry figures are not available on boys' wear and on children's underwear and nightwear manufacturers. These are combined in industry data on men's and boys' manufacturers and women's and children's manufacturers, which are included in other Fact Files covering specific apparel categories.

** Each business location is counted as a separate establishment.

Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished products inventories. It avoids the duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes the best value measure of individual industries.

(footnotes continued)

(footnotes continued)

The value of industry shipments includes both primary and secondary products made by manufacturers in the industry, as well as receipts for contract work and miscellaneous receipts. The value of primary products made in this industry, as well as the value of these products made by secondary producers is covered in the Value of Shipments section of this Fact File. See page 22.

Source: U.S. Bureau of the Census,
1982 Census of Manufactures,
Industry Series MC82-1-23C.

Children's Wear Industry Historical Trends & Forecast

In the years between the complete censuses of manufactures conducted every five years, the Census Bureau compiles the annual surveys of manufactures to provide estimates based on a sample of firms classified in the industry. The International Trade Administration has drawn on these sources and compiles estimates for 1983 and 1984 on value of industry shipments in the following children's wear industries, as well as the value on a constant (1972) basis.

According to this source, the real gain in shipments by the Children's Dress & Blouse Industry for 1982 compared with 1977 was 6.6%, while the value in the Children's Coat & Suit Industry actually declined 1.9% when inflation is taken into account.

Children's Wear Value of Industry Shipments, 1977-1984
(All Values in Millions of Dollars)

	Historical Trends						Forecast		Compound Annual Growth Rate
	1977	1978	1979	1980	1981	1982	1983	1984	1977-1982
Children's Dresses & Blouses (SIC 2361)									
Value of shipments (current dollars)	$825	896	896	969	1,133	1,441*	1,526	1,607	+11.8%
Value of shipments (1972 $)	$669	709	672	685	724	923	1,001	1,024	+ 6.6
Children's Coats & Suits (SIC 2363)									
Value of shipments (current dollars)	$174	178	179	177	169	179*	169	180	+ 0.6%
Value of shipments (1972 $)	$136	132	127	136	119	124	121	125	- 1.9%

* Above figures are preliminary 1982 census of manufactures findings. See pages 2 and 3 for final figures.

Source: U.S. Department of Commerce,
International Trade Administration
1985 U.S. Industrial Outlook.

GENERAL INDUSTRY STATISTICS

Employment & Earnings

Current information on employment and earnings in the children's wear industry is supplied by the U.S. Bureau of Labor Statistics. Their reports show a 5.4% employment growth of the children's outerwear segment from 1983 to 1984. The number of production workers employed--nearly 85% of the total--rose at a slightly lower level. Dress & blouse manufacturing personnel grew 2.8% in 1984. These workers average less hours and lower weekly earnings than their outerwear counterparts. The following figures are not directly comparable with census data on employment due to a difference in the methodology used.

Employment & Earnings in Children's Wear Industries, 1977 & 1982-1984

	Annual Averages				% Change
	1984	1983	1982	1977	1984/1983
Children's outerwear (dresses, blouses, coats, suits)(SIC 236)					
All employees (thous.)	62.8	59.6	61.4	69.2	+ 5.4%
Production workers (thous.)	53.1	50.7	52.0	59.0	+ 4.7
Average weekly earnings	$180.68	$172.32	$166.37	$116.77	+ 4.8
Average weekly hours	36.5	35.9	35.1	35.6	+ 1.7
Average weekly overtime hrs.	1.1	1.0	1.0	1.3	+10.0
Dresses & blouses (SIC 2361)					
All employees (thous.)	25.6	25.0	26.3	27.1	+ 2.4
Production workers (thous.)	22.6	22.1	23.5	24.2	+ 2.3
Average weekly earnings	$174.93	$168.73	$164.38	$117.15	+ 3.7
Average weekly hours	35.7	35.3	34.9	35.5	+ 1.1
Average weekly overtime hrs.	1.1	0.9	0.9	1.4	+22.2

Source: U.S. Bureau of Labor Statistics, Employment & Earnings.

Concentration in the Industry

The children's wear industry has remained relatively constant in terms of establishment size since the last census of manufactures five years ago. The majority still have less than 50 employees, in particular the coat & suit segment, where more than 60% of the plants fall into this category. Plants with 100 or more employees, though small in number, now account for the bulk of the industry's workforce and production at levels that significantly surpass those reported in the 1977 Census. In other words, the big are getting bigger.

GENERAL INDUSTRY STATISTICS

Concentration in the Industry

Children's Apparel Industries by Employment Size, 1982

	Establishments		Employees		Shipments	
	Number	% of Total	Number (Thous.)	% of Total	Mil. $	% of Total
Dresses & blouses (SIC 2361) total	556	100.0%	37.7	100.0%	$1,417.7	100.0%
By establishment size:						
Under 20 employees	165	29.7	1.2	3.2	121.0	8.5
20-49 employees	166	29.9	5.2	13.8	293.0	20.7
50-99 employees	124	22.3	8.7	23.1	265.5	18.7
100-249 employees	71	12.8	10.6	28.1	320.7	22.6
250 or more employees	30	5.4	12.0	31.8	417.5	29.4
Coats & suits (SIC 2363) total	81	100.0	6.3	100.0	193.1	100.0
By establishment size:						
Under 20 employees	30	37.0	0.3	4.8	34.7	18.0
20-49 employees	19	23.5	0.7	11.1	23.3	12.1
50-99 employees	14	17.3	1.0	15.9	20.0	10.4
100-249 employees	12	14.8	1.7	27.0	30.4	15.7
250 or more employees	6	7.4	2.6	41.3	84.7	43.9
Other outerwear (SIC 2369) total	332	100.0	27.6	100.0	1,102.4	100.0
By establishment size:						
Under 20 employees	116	34.9	0.8	2.9	60.3	5.5
20-49 employees	70	21.1	2.3	8.3	96.5	8.8
50-99 employees	62	18.7	4.4	15.9	164.7	14.9
100-249 employees	59	17.8	9.0	32.6	313.6	28.4
250 or more employees	25	7.5	11.0	39.9	467.3	42.4

Source: U.S. Bureau of the Census, 1982 Census of Manufactures, Industry Series, MC82-1-23C.

Leading States

New York remains the dominant state in the manufacturing of children's wear. It has the most plants in all three reported segments of the industry, in particular children's coats and suits, where the state accounts for a third of all establishments. The other two segments--children's dresses and blouses and children's outerwear--are not as concentrated. More states have a share of the manufacturing activity in these areas, notably Pennsylvania, California, North Carolina and New Jersey.

GENERAL INDUSTRY STATISTICS

Leading States

Leading Manufacturing States in Children's Wear Industries, 1982

	No. of Establishments		Total Employees	Value of Industry Shipments
	Total	With 20+ Employees	(Thous.)	(Mil. $)
Children's dresses & blouses (SIC 2361)				
Leading states:				
New York	131	81	4.6	$ 421.7
Pennsylvania	90	76	7.2	195.0
California	56	23	1.4	59.4
North Carolina	45	39	2.5+	na
New Jersey	42	28	1.7	64.9
Florida	26	17	1.1	25.3
Virginia	26	24	2.7	38.8
Texas	23	16	1.0 - 2.5*	na
U.S. total	556	391	37.7	1,417.7
Leading states, total	439	304	23.0	--
Percent of U.S. total	79.0%	77.7%	61.0%	--
Children's coats & suits (SIC 2363)				
Leading states:				
New York	27	14	1.9	$ 79.0
New Jersey	14	6	0.5	8.6
Georgia	14	13	0.5 - 1.0*	na
U.S. total	81	51	6.3	193.1
Leading states, total	55	33	3.2	--
Percent of U.S. total	67.9%	64.7%	50.8%	--
Children's outerwear, n.e.c. (SIC 2369)				
Leading states:				
New York	75	36	2.5	$ 188.2
California	30	15	1.0 - 2.5*	na
North Carolina	26	23	1.0 - 2.5*	na
New Jersey	25	12	1.3	45.0
Pennsylvania	25	19	1.0 - 2.5*	na
Georgia	22	21	2.5+	na
Florida	20	11	1.0	57.4
U.S. total	322	216	27.6	1,102.4
Leading states, total	223	137	13.0	--
Percent of U.S. total	67.2%	63.4%	47.1%	--

na not available (withheld by Census Bureau to avoid disclosing data for individual companies; data included in U.S. totals.)
* Mid-point of ranges used to arrive at totals.

Source: U.S. Bureau of the Census,
1982 Census of Manufactures,
Industry Series, MC82-1-23C.

PRODUCTION

Children's & Girls' Wear

Production, as defined by the U.S. Department of Commerce, consists of all specified types of garments cut or knit within the United States. Garments which are cut in the U.S., sent outside the country to be sewn, and shipped back under the 807 import category are also included.

Data on the production of children's & girls' wear is reported in the Current Industrial Reports compiled by the U.S. Bureau of the Census. Virtually all known manufacturers in the industry are surveyed for these annual reports. The term "children's" includes little boys (infants-toddlers) as well as little girls and older girls.

Unit production in 1983, when compared with the prior year, shows varying performances for these products depending on both the type of apparel and the age group for which they are produced. To cite one example, production of infants' and toddlers' nightgowns rose by more than a third while those for children declined. This is a reflection of the make-up in the U.S. market's demographic characteristics at the present time.

Production of Specified Types of Children's & Girls' Wear, 1982, 1983
(Thousands of Units)

	1983	1982	% Change 1983/1982
Dresses, total	78,624	70,692	+ 11.2%
Girls', sub-teen & teenage	22,428	18,000	+ 24.6
Children's	33,924	33,348	+ 1.7
Infants' & toddlers'	22,272	19,344	+ 15.1
Blouses (excluding knit outerwear sport shirts), total	57,348	56,604	+ 1.3
Girls', sub-teen & teenage	32,628	32,616	+ 0.04
Children's, infants' & toddlers'	24,720	23,988	+ 3.0
Knit outerwear sport shirts, except sweatshirts, total	142,788	141,252	+ 1.1
Girls', sub-teen & teenage	15,264	19,212	- 20.5
Children's	79,992	77,352	+ 3.4
Infants' & toddlers'	47,532	44,688	+ 6.4
Sweatshirts, total	3,624	3,660	- 1.0
Sweaters, total	12,564	11,508	+ 9.2
Coats, excluding coat & legging sets, total	3,012	3,192	- 5.6
Girls', sub-teen & teenage	1,596	1,488	+ 7.3
Children's & infants'	1,416	1,704	- 16.9
Coat & legging sets, snowpants sets, & ski & snow suits, total	2,196	3,120	- 29.6
Raincoats & raincapes, total	228	384	+ 40.6
Jackets, total	8,532	7,704	+ 10.7
Vests, total	204	276	- 26.1
Suits, total	1,968	2,148	- 8.4

(continued)

PRODUCTION

Children's & Girls' Wear

Production of Specified Types of Children's & Girls' Wear, 1982, 1983
(Thousands of Units)
(continued)

	1983	1982	% Change 1983/1982
Skirts, total	18,744	19,272	- 2.7%
Slacks, incl. jean-cut casual slacks, total	52,632	50,220	+ 4.8
Girls', sub-teen & teenage	14,952	16,356	- 8.6
Children's & infants'	37,680	33,864	+ 11.3
Jeans & dungarees, total	31,980	32,580	- 1.8
Girls', sub-teen & teenage	13,956	12,324	+ 13.2
Children's & infants'	18,024	20,256	- 11.0
Shorts, total	21,156	20,328	+ 4.1
Girls', sub-teen & teenage	8,316	7,260	+ 14.5
Children's & infants'	12,840	13,068	- 1.7
Playgarments, incl. playsuits & haltertops, total	98,148	100,668	- 2.5
Girls', sub-teen & teenage	5,316	5,400	- 1.5
Children's	26,268	25,224	+ 4.1
Infants' & toddlers'	66,564	70,044	- 5.0
Swimsuits, total	9,900	10,416	- 4.9
Panties, incl. pettipants, total	144,780	150,132	- 3.6
Girls' & children's	93,192	96,456	- 3.4
Infants' & toddlers'	51,588	53,676	- 3.9
Slips, vests & undershirts, total	75,672	71,232	+ 6.2
Girls' & children's	19,884	19,800	+ 0.4
Infants' & toddlers'	55,788	51,432	+ 8.5
Nightgowns, total	26,640	23,688	+ 12.5
Girls' & children's	14,220	14,376	- 1.1
Infants' & toddlers'	12,420	9,312	+ 33.4
Pajamas, incl. heavyweight sleeping garments with feet, total	65,172	58,812	+ 10.8
Girls' & children's	19,584	16,668	+ 17.5
Infants' & toddlers'	45,588	42,144	+ 8.2
Robes, girls', children's, infants'	2,544	2,664	- 4.5

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Women's & Children's Outerwear, MA-23F(83)-1,
Underwear & Nightwear MA-23G(83)-1.

PRODUCTION

Hosiery

The production of infants' & children's hosiery rose 5% in 1983 to more than 27 million pairs. Waist-highs had the largest growth for the year by a wide margin--nearly 50%.

Production of Infants' & Children's Hosiery, 1982, 1983
(Dozens of Pairs in Thousands)

	1983	1982	% Change 1983/1982
Infants' & children's hosiery (sizes 3-8 1/2), total	27,041	25,764	+ 5.0%
Footsocks	620	618	+ 0.3
Anklets	16,522	16,055	+ 2.9
Knee-highs	6,993	6,653	+ 5.1
Waist-highs	1,471	992	+ 48.3
Mid-calf/crew	1,396	1,446	- 3.5

Note: Production of hosiery for boys and girls is not separately reported, but combined in a total on production of hosiery sizes 8-11 which includes women's. For this information, see the HOSIERY FACT FILE.

Source: National Association of Hosiery Manufacturers, 1983 Hosiery Statistics.

Diapers

Production of Infants' Diapers, 1982, 1983
(Dozens of Pairs in Thousands)

	1983	1982	% Change 1983/1982
Diapers, total	7,518	8,133	- 7.6%
Bird's-eye	3,672	3,825	- 4.0
Gauze	3,846	4,308	- 10.7

Source: National Cotton Council of America, Cotton Counts Its Customers 1984.

Children's & Girls' Wear

The distribution of 1982 and 1983 cuttings of children's and girls' clothing by type of fabric and construction, based on manufacturers reporting to the Census Bureau, is covered in the following table.

PRODUCTION

Children's & Girls' Wear

Production of Children's & Girls' Wear by Fabric & Construction, 1982, 1983
(Percent Distribution)

	Percent	
	1983	1982
Girls', sub-teen & teenage girls' dresses, total	100.0%	100.0%
By construction:		
Woven fabric	67.9	72.0
Knit fabric	20.3	21.3
Construction n.s.k.	11.7	6.7
By fabric:		
All cotton & chiefly cotton	49.8	43.4
All man-made & chiefly man-made	38.2	45.9
All wool & chiefly wool, All other fabric	4.9	3.7
Fabric n.s.k.	7.1	7.0
Children's dresses, total	100.0	100.0
By construction:		
Woven fabric	64.4	60.0
Knit fabric	27.6	30.8
Construction n.s.k.	8.0	9.2
By fabric:		
All cotton & chiefly cotton	19.3	21.9
All man-made & chiefly man-made	68.2	62.5
All wool & chiefly wool, All other fabric, Fabric n.s.k.	12.4	15.6
Infants' & toddlers' dresses, total	100.0	100.0
By construction:		
Woven fabric	69.9	78.2
Knit fabric	13.7	14.1
Construction n.s.k.	16.4	7.7
By fabric:		
All cotton & chiefly cotton	13.5	17.3
All man-made & chiefly man-made	73.3	75.2
All other fabric, Fabric n.s.k.	13.2	75.2
Girls', sub-teen & teenage girls' blouses, exc. knit outerwear sport shirts, total	100.0	100.0
By construction:		
Woven fabric	55.4	55.6
Knit fabric	41.4	41.0
Construction n.s.k.	3.2	3.3
By fabric:		
All cotton & chiefly cotton	17.2	17.2
All man-made & chiefly man-made	74.0	74.4
All other fabric, Fabric n.s.k.	8.7	8.4

(continued)

PRODUCTION

Children's & Girls' Wear

Production of Children's & Girls' Wear by Fabric & Construction, 1982, 1983
(Percent Distribution)
(continued)

	Percent	
	1983	1982
Children's, infants' & toddlers' blouses, exc. knit outerwear sport shirts, total	100.0%	100.0%
By construction:		
Woven fabric	61.7	72.8
Knit fabric	27.3	15.1
Construction n.s.k.	11.0	12.1
By fabric:		
All cotton & chiefly cotton	20.1	16.9
All man-made & chiefly man-made	68.8	71.0
All other fabric, Fabric n.s.k.	11.1	12.1
Girls', sub-teen & teenage girls' knit outerwear sport shirts, exc. sweatshirts, total	100.0	100.0
By fabric:		
All cotton & chiefly cotton	46.9	39.6
All man-made & chiefly man-made	52.0	58.6
Fabric n.s.k.	1.0	1.7
Children's knit outerwear sport shirts, exc. sweatshirts, total	100.0	100.0
By fabric:		
All cotton & chiefly cotton	23.2	21.0
All man-made & chiefly man-made	74.2	75.1
Fabric n.s.k.	2.6	3.8
Infants' & toddlers' knit outerwear sport shirts, exc. sweatshirts, total	100.0	100.0
By fabric:		
All cotton & chiefly cotton	19.9	19.4
All man-made & chiefly man-made	79.4	79.8
Fabric n.s.k.	0.7	0.8
Girls', children's & infants' sweaters, incl. sweater vests, total	100.0	100.0
By fabric:		
All man-made & chiefly man-made	70.0	78.1
All cotton & chiefly cotton, All wool & chiefly wool, Fabric n.s.k.	30.0	21.9

(continued)

PRODUCTION

Children's & Girls' Wear

Production of Children's & Girls' Wear by Fabric & Construction, 1982, 1983
(Percent Distribution)
(continued)

	Percent	
	1983	1982
Girls', sub-teen & teenage girls' coats, exc. coat & legging sets, total	100.0%	100.0%
By fabric:		
All man-made & chiefly man-made	83.5	82.2
All wool & chiefly wool, Fabric n.s.k.	16.5	17.7
Children's & infants' coats, exc. coat & legging sets, total	100.0	100.0
By fabric:		
All man-made & chiefly man-made	54.2	63.4
All wool & chiefly wool, Fabric n.s.k.	45.8	36.6
Girls', children's & infants' jackets, total	100.0	100.0
By fabric:		
All man-made & chiefly man-made	75.4	76.0
All wool & chiefly wool	1.1	1.4
All other fabric	23.5	22.6
Fabric n.s.k.		
Girls', children's & infants' suits, total	100.0	100.0
By fabric:		
All cotton & chiefly cotton	27.4	45.2
All man-made & chiefly man-made	45.7	30.7
All other fabric, Fabric n.s.k.	26.8	24.0
Girls', children's & infants' skirts, total	100.0	100.0
By construction:		
Woven fabric	51.9	52.0
Knit fabric	11.0	11.0
Construction n.s.k.	37.1	37.0
By fabric:		
All cotton & chiefly cotton	26.1	26.0
All man-made & chiefly man-made	48.3	48.6
All wool & chiefly wool, Fabric n.s.k.	25.6	25.4
Girls', sub-teen & teenage girls' slacks, incl. jean-cut casual slacks, total	100.0	100.0
By construction:		
Woven fabric	78.6	79.2
Knit fabric	2.9	6.9
Construction n.s.k.	18.5	13.9

(continued)

PRODUCTION

Children's & Girls' Wear

Production of Children's & Girls' Wear by Fabric & Construction, 1982, 1983
(Percent Distribution)
(continued)

	Percent	
	1983	1982
Girls', sub-teen & teenage girls' slacks, (cont'd.)		
By fabric:		
All cotton & chiefly cotton	28.0%	25.0%
All man-made & chiefly man-made	57.9	61.9
All wool & chiefly wool; Fabric n.s.k.	14.0	13.1
Children's & infants' slacks, incl. jean-cut casual slacks, total	100.0	100.0
By construction:		
Woven fabric	75.7	75.4
Knit fabric	20.9	21.1
Construction n.s.k.	3.4	3.4
By fabric:		
All cotton & chiefly cotton	36.1	35.9
All man-made & chiefly man-made	60.2	60.2
All wool & chiefly wool; All other fabric; Fabric n.s.k.	3.7	3.9
Girls', sub-teen & teenage girls' jeans & dungarees, total	100.0	100.0
By fabric:		
All cotton & chiefly cotton	62.9	62.5
All man-made & chiefly man-made	29.9	32.1
Fabric n.s.k.	7.1	5.3
Children's & infants' jeans & dungarees, total	100.0	100.0
By fabric:		
All cotton & chiefly cotton	43.8	43.4
All man-made & chiefly man-made	50.3	51.8
Fabric n.s.k.	5.9	4.9
Girls' sub-teen & teenage girls' shorts, total	100.0	100.0
By construction:		
Woven fabric	74.9	76.7
Knit fabric	13.6	16.0
Construction n.s.k.	11.5	7.3
By fabric:		
All cotton & chiefly cotton	18.0	19.3
All man-made & chiefly man-made	71.0	74.2
Fabric n.s.k.	11.0	6.4

(continued)

PRODUCTION

Children's & Girls' Wear

Production of Children's & Girls' Wear by Fabric & Construction, 1982, 1983
(Percent Distribution)
(continued)

	Percent	
	1983	1982
Children's & infants' shorts, total	100.0%	100.0%
By construction:		
Woven fabric	63.9	64.4
Knit fabric	33.9	32.4
Construction n.s.k.	2.1	3.2
By fabric:		
All cotton & chiefly cotton	38.8	39.0
All man-made & chiefly man-made	57.7	56.4
All other fabric, Fabric n.s.k.	3.5	4.6
Children's playgarments, incl. playsuits & halter tops, total	100.0	100.0
By construction:		
Woven fabric	43.0	48.1
Knit fabric	25.1	30.5
Construction n.s.k.	31.9	21.4
By fabric:		
All cotton & chiefly cotton	45.2	52.2
All man-made & chiefly man-made	24.9	28.6
Fabric n.s.k.	29.9	19.2
Infants' & toddlers' playgarments, incl. creepers & rompers, total	100.0	100.0
By construction:		
Woven fabric	47.2	43.3
Knit fabric	50.6	54.5
Construction n.s.k.	2.2	2.2
By fabric:		
All cotton & chiefly cotton	29.9	28.2
All man-made & chiefly man-made	67.4	69.6
All other fabric, Fabric n.s.k.	2.7	2.2
Girls', infants' & children's swimsuits, total	100.0	100.0
By construction:		
Woven fabric	9.0	18.1
Knit fabric	90.1	81.0
Construction n.s.k.	1.0	0.9
By fabric:		
All man-made & chiefly man-made	98.5	98.6
Fabric n.s.k.	1.4	1.4

(continued)

Children's & Girls' Wear

Production of Children's & Girls' Wear by Fabric & Construction, 1982, 1983
(Percent Distribution)
(continued)

	Percent	
	1983	1982
Underwear		
Girls' underwear & children's panties, incl. pettipants, total	100.0%	100.0%
By construction:		
Woven fabric	3.9	8.5
Knit fabric	96.1	91.5
By fabric:		
All cotton & chiefly cotton	66.0	66.0
All man-made & chiefly man-made	33.1	32.9
Fabric n.s.k.	0.9	1.1
Girls' & children's slips, vests & undershirts, total	100.0	100.0
By construction:		
Woven fabric	12.2	9.7
Knit fabric	87.7	90.3
By fabric:		
All cotton & chiefly cotton	37.8	35.5
All man-made & chiefly man-made	62.2	64.5
Infants' & toddlers' slips, vests, undershirts & other underwear, exc. panties, total	100.0	100.0
By fabric:		
All cotton & chiefly cotton	86.8	86.9
All man-made & chiefly man-made	10.8	10.8
Fabric n.s.k.	2.4	2.3
Nightwear		
Girls' & children's pajamas incl. heavyweight sleeping garments with feet, total	100.0	100.0
By construction:		
Woven fabric	14.1	14.2
Knit fabric	85.9	85.7
Girls' & children's nightgowns, total	100.0	100.0
By construction:		
Woven fabric	32.8	32.9
Knit fabric	66.2	65.9
Construction n.s.k.	1.0	1.2
By fabric:		
All cotton & chiefly cotton	99.1	99.1
All man-made & chiefly man-made	0.9	0.9
Fabric n.s.k.		

(continued)

PRODUCTION

Children's & Girls' Wear

Production of Children's & Girls' Wear by Fabric & Construction, 1982, 1983
(Percent Distribution)
(continued)

	Percent	
	1983	1982
Nightwear (cont'd.)		
Infants' & toddlers' nightgowns, total	100.0%	100.0%
By construction:		
Woven fabric	10.2	11.7
Knit fabric	89.8	88.3
Infants' & toddlers' pajamas, incl. heavyweight sleeping garments with feet, total	100.0	100.0
By construction:		
Woven fabric	2.8	3.2
Knit fabric	97.2	96.7
By fabric:		
All cotton & chiefly cotton	3.6	5.0
All man-made & chiefly man-made	96.4	95.0

n.s.k. not specified by kind.

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Women's & Children's Outerwear, MA-23F(83)-1,
Underwear & Nightwear MA-23G(83)-1.

Boys' Wear

Following are figures reported by the Census Bureau on production of boys' wear items, based on surveys of manufacturers in 1982 and 1983.

Data on little boys' wear (infants' and toddlers')--where available--is reported as these items are merchandised, i.e. combined with items for female infants and toddlers.

It should also be noted that many items of boys' apparel, not shown in the following tables, are not separately reported by the Census Bureau, but are combined with men's wear. These figures are reported in specific men's wear Fact Files.

Production of Specified Types of Boys' Wear-1982, 1983

	(Thous. Units)		% Change	Percent of
	1983	1982	1983/82	Total 1983
Boys' suits, incl. casual & uniform, total	2,986	3,473	- 14.0%	100.0%
By fabric:				
All man-made & chiefly man-made	2,663	3,303	- 19.4	89.2
All wool & chiefly wool	95	50	+ 90.0	3.2
Fabric n.s.k.	228	120	+ 90.0	7.6

(continued)

PRODUCTION

Boys' Wear

Production of Specified Types of Boys' Wear-1982, 1983
(continued)

	(Thous. Units) 1983	1982	% Change 1983/82	Percent of Total 1983
Boys' suits (cont'd.)				
By construction:				
Woven fabric	2,752	2,903	- 5.2%	92.2%
Knit fabric Construction n.s.k.	234	570	- 58.9	7.8
Boys' overcoats, topcoats, & tailored suburban & car coats, incl. uniform, total	434	404	+ 7.4	100.0
By fabric:				
All man-made & chiefly man-made	385	359	+ 7.2	88.7
Fabric n.s.k.	49	45	+ 8.9	11.3
Boys' tailored suit-type dress & sport coats, incl. uniform, total	2,175	2,016	+ 7.9	100.0
By fabric:				
All wool & chiefly wool	264	298	- 11.4	12.1
All man-made & chiefly man-made	862	681	+ 26.6	39.6
All other fabric	112	179	- 37.4	5.1
Fabric n.s.k.	937	858	+ 9.2	43.1
Boys' separate vests, exc. sweater vests total	199	307	- 35.2	100.0
By fabric:				
All cotton & chiefly cotton	111	245	- 54.7	55.8
All man-made & chiefly man-made Fabric n.s.k.	88	62	+ 41.9	44.2
Boys' dress shirts, incl. uniform, total	9,204	11,064	- 16.8	100.0
By fabric:				
All cotton & chiefly cotton	5,724	7,500	- 23.7	62.2
All man-made & chiefly man-made	2,256	2,412	- 6.5	24.5
All other fabric Fabric n.s.k.	1,224	1,152	+ 6.2	13.3
By construction:				
Woven fabric	5,892	6,720	- 12.3	64.0
Knit fabric	2,568	3,744	- 31.4	27.9
Construction n.s.k.	744	600	+ 24.0	8.1
Boys' woven sport shirts, total	11,832	15,564	- 24.0	100.0
By fabric:				
All cotton & chiefly cotton	3,540	3,864	- 8.4	29.9
All man-made & chiefly man-made	6,828	11,004	- 37.9	57.7
All wool & chiefly wool All other fabric Fabric n.s.k.	1,464	696	+110.3	12.4

(continued)

PRODUCTION

Boys' Wear

Production of Specified Types of Boys' Wear-1982, 1983
(continued)

	(Thous. Units) 1983	1982	% Change 1983/82	Percent of Total 1983
Boys' knit sport shirts, exc. sweatshirts total	149,508	141,672	+ 5.5%	100.0%
By fabric:				
All cotton & chiefly cotton	20,892	25,320	- 17.5	14.0
All man-made & chiefly man-made	112,224	99,528	+ 12.8	75.1
All other fabric	6,324	6,180	+ 2.3	4.2
Fabric n.s.k.	10,068	10,644	- 5.4	6.7
By type:				
Full open front shirts	4,596	3,876	+ 18.6	3.1
Partial front opening	53,832	41,736	+ 29.0	36.0
T-shirts made for outerwear, incl. tank tops	81,276	83,628	- 2.8	54.4
Type n.s.k.	9,804	12,432	- 21.1	6.5
Boys' sweaters, incl. sweater vests, knit cardigan & pullovers, total	3,840	4,332	- 11.4	100.0
By fabric:				
All man-made & chiefly man-made	2,604	3,264	- 20.2	67.8
All wool & chiefly wool; All other fiber; Fabric n.s.k.	1,236	1,068	+ 15.7	32.2
Boys' separate dress & sport trousers, including uniform, total	15,567	14,884	+ 4.6	100.0
All cotton & chiefly cotton	2,222	2,238	- 0.7	14.3
All man-made & chiefly man-made	11,746	10,963	+ 7.1	75.4
Fabric n.s.k.	1,599	1,683	- 5.0	10.3
Boys' jeans & dungarees, total	70,627	64,419	+ 9.6	100.0
By fabric:				
All cotton & chiefly cotton	61,954	52,150	+ 18.8	87.7
All man-made & chiefly man-made	7,602	11,202	- 32.1	10.8
Fabric n.s.k.	1,071	1,067	+ 0.4	1.5
Boys' jean-cut casual slacks, total	18,668	20,100	- 7.1	100.0
By fabric:				
All cotton & chiefly cotton	8,841	11,542	- 23.4	47.4
All man-made & chiefly man-made	9,827	8,558	+ 14.8	52.6
Boys' shorts, exc. athletic, total	6,895	9,548	- 27.8	100.0
By fabric:				
All cotton & chiefly cotton	3,527	4,910	- 28.2	51.1
All man-made & chiefly man-made	3,334	4,314	- 22.7	48.3
All other fabric	34	324	- 89.5	0.5

(continued)

PRODUCTION

Boys' Wear

Production of Specified Types of Boys' Wear-1982, 1983
(continued)

	(Thous. Units) 1983	1982	% Change 1983/82	Percent of Total 1983
Boys' shorts, exc. athletic (cont'd.)				
By construction:				
Woven fabric	3,995	4,637	- 13.8%	57.9%
Knit fabric	2,900	4,911	- 40.9	42.1
Boys' coveralls, overalls, work pants & jumpsuits, total	6,420	4,860	+ 32.1	100.0
By fabric:				
All cotton & chiefly cotton	4,236	3,276	+ 29.3	66.0
All man-made & chiefly man-made; Fabric n.s.k.	2,184	1,584	+ 37.9	34.0
Boys' nontailored heavy outer jackets, exc. ski, total	2,328	2,712	- 14.2	100.0
By fabric:				
All cotton & chiefly cotton	228	396	- 42.4	9.8
All man-made & chiefly man-made	1,356	1,584	- 14.4	58.2
All wool & chiefly wool	96	132	- 27.3	4.1
All other fabric; Fabric n.s.k.	648	600	+ 8.0	27.8
Boys' nontailored light outer jackets, total	5,580	6,180	- 9.7	100.0
By fabric:				
All cotton & chiefly cotton	756	636	+ 18.9	13.5
All man-made & chiefly man-made	4,296	4,704	- 8.7	77.0
All other fabric	528	840	- 37.1	9.5
Boys' pajamas & other nightwear, exc. robes, total	14,208	14,976	- 5.1	100.0
By construction:				
Woven fabric	3,468	3,300	+ 5.1	24.4
Knit fabric	10,080	11,124	- 9.4	70.9
Construction n.s.k.	660	552	+ 19.6	4.6
By fabric:				
All cotton & chiefly cotton	4,092	4,068	+ 0.6	28.8
All man-made & chiefly man-made	9,444	10,356	- 8.8	66.5
Fabric n.s.k.	672	552	+ 21.7	4.7
Boys' lightweight knit undershirts with 1/4 sleeve, exc. T-shirts made for outerwear, total	39,696	59,952	- 33.8	100.0
By fabric:				
Cotton/polyester blended fabric	16,272	25,944	- 37.3	41.0
All cotton & all other cotton blends	23,424	34,008	- 31.1	59.0

(continued)

PRODUCTION

Boys' Wear

Production of Specified Types of Boys' Wear-1982, 1983
(continued)

	(Thous. Units) 1983	1982	% Change 1983/82	Percent of Total 1983
Boys' supporter type knit briefs, total	85,584	103,392	- 17.2%	100.0%
By fabric:				
Cotton/polyester blended fabric	18,612	23,928	- 22.2	21.7
All cotton & all other cotton blends	66,972	79,464	- 15.7	78.2

n.s.k. not specified by kind.

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Men's & Boys' Outerwear, MA-23E(83)-1,
Underwear & Nightwear, MA23G(83)-1.

MATERIALS CONSUMED IN PRODUCTION

The cost of materials consumed or put into production by establishments classified in this industry rose 40.3% from 1977 to 1982. The delivered cost of nearly $900 million includes such components as raw materials, semifinished goods and contract work. Purchased knitted fabrics account for a larger proportion of materials consumed by all three children's wear segments then they did five years ago.

Materials Consumed in the Production of Children's Wear, 1982

	Delivered Cost (million $)	Percent of Total
Children's dresses & blouses (SIC 2361) total	$438.5	100.0%
Broadwoven fabrics	131.4	30.0
Purchased knitted fabrics	134.6	30.7
All other materials, containers & supplies	53.6	12.2
Materials, containers & supplies n.s.k.	118.9	27.1
Children's coats & suits (SIC 2363) total	67.7	100.0
Broadwoven fabrics	25.1	37.1
Purchased knitted fabrics	11.9	17.6
All other materials, containers & supplies	10.4	15.4
Materials, containers & supplies n.s.k.	20.3	30.0

(continued)

MATERIALS CONSUMED IN PRODUCTION

Materials Consumed in the Production of Children's Wear, 1982
(continued)

	Delivered Cost (million $)	Percent of Total
Children's outerwear, n.e.c. (SIC 2369) total	$391.1	100.0%
Broadwoven fabrics	138.9	35.5
Purchased knitted fabrics	83.4	21.3
All other materials, containers & supplies	49.3	12.6
Materials, containers & supplies n.s.k.	119.5	30.6

n.s.k. not specified by kind.
n.e.c. not elsewhere classified.

Source: U.S. Bureau of the Census,
1982 Census of Manufactures,
Industry Series MC82-I-23C.

VALUE OF PRODUCT SHIPMENTS

The value of U.S. shipments of the specified products covered in the following table represents the total value of shipments of products classified as primary to an industry that were shipped by all manufacturing establishments regardless of their industry classification.

In the case of boys' wear, reported value of product shipments is limited to suits, coats and tailored jackets. Other product types are combined in information on men's wear shipments and covered in specific men's wear Fact Files.

Value of Shipments by All U.S. Producers
of Specified Categories of Boys' & Children's Wear--1977, 1982

	Millions of $ 1982	Millions of $ 1977	% Change 1982/1977
Boys' suits, coats & tailored jackets (SIC 23114)	$ 148.2	$ 149.7	- 1.0%
Children's dresses & blouses (SIC 2361)	1,491.7	839.1	+ 77.8%
Dresses & shirts	755.4	--	--
Knit sport shirts	450.2	176.1	+155.7*
Contract work on dresses & blouses	208.7	134.5	+ 55.2
Dresses & blouses n.s.k.	77.4	528.5	- 85.4*

(continued)

VALUE OF PRODUCT SHIPMENTS

Value of Shipments by All U.S. Producers
Of Specified Categories of Boys' & Children's Wear--1977, 1982
(continued)

	Millions of $		% Change
	1982	1977	1982/1977
Children's coats & suits (SIC 2363)	$ 211.4	$ 191.5	+ 10.4%
Coats, jackets, suits & snowsuits	171.5	173.6	- 1.2
Contract work on coats & suits	32.4	17.9	+ 81.0
Coats & suits n.s.k.	7.4	--	--
Children's outerwear n.e.c. (SIC 2369)	1,246.6	765.9	+ 62.8
Outerwear n.e.c.	1,062.9	685.9	+ 55.0
Contract work on outerwear n.e.c.	123.2	80.0	+ 54.0
Outerwear n.e.c. & n.s.k.	60.5	--	--

n.s.k. not specified by kind.
n.e.c. not elsewhere classified.
* The large percentage differences are a reflection of improvements in classifying specific garment types in 1982.
Note: For a definition of SIC's, see page 3.

Children's & Girls' Wear

The source for 1983 values of specified types of children's & girls' wear, as well as boys' wear, are the Census Bureau's Current Industrial Reports. This data, like that on unit production, shows a wide range of results depending on the particular product.

The largest gain in shipments in 1983 was registered in girls', sub-teens' & teens' shorts, up 27.4% for the year. Infants' & toddlers' nightgowns were only slightly behind, with a 26.1% jump. On the down side, raincoats & raincapes (total) declined 37.3% in shipments in 1983 while vests dropped 27.3%.

Shipments of Specified Types in Children's & Girls' Wear--1982, 1983
(Value in Millions of Dollars)

	1983	1982	% Change 1983/1982
Children's & girls' wear, total of specified categories*	$3,027.8	$3,016.9	+ 0.4%
Dresses, total	567.7	530.1	+ 8.8
Girls', sub-teen & teenage	166.2	144.3	+ 15.2
Children's	271.4	258.5	+ 5.0
Infants' & toddlers'	139.1	127.3	+ 9.3

(continued)

VALUE OF PRODUCT SHIPMENTS

Children's & Girls' Wear

Shipments of Specified Types of Children's & Girls' Wear--1982, 1983
(Value in Millions of Dollars)
(continued)

	1983	1982	% Change 1983/1982
Blouses (excluding knit outerwear sport shirts), total	$ 231.4	$ 230.6	+ 0.3%
Girls', sub-teen & teenage	140.5	140.3	+ 0.1
Children's, infants' & toddlers'	90.9	90.3	+ 0.7
Knit outerwear sport shirts, except sweatshirts, total	450.4	438.7	+ 2.7
Girls', sub-teen & teenage	62.2	79.3	- 21.6
Children's	255.5	241.7	+ 5.7
Infants' & toddlers'	132.7	117.7	+ 12.7
Sweatshirts, total	7.4	7.6	- 2.6
Sweaters	61.8	55.3	+ 11.7
Coats, excluding coat & legging sets, total	36.6	38.5	+ 4.9
Girls', sub-teen & teenage	19.2	17.6	+ 9.1
Children's & infants'	17.4	20.9	- 16.7
Coat & legging sets, snowpants sets & ski & snow suits, total	34.8	46.3	- 24.8
Raincoats & raincapes, total	4.2	6.7	- 37.3
Jackets	67.8	62.0	+ 9.3
Vests	1.6	2.2	- 27.3
Suits	24.3	26.3	- 7.6
Skirts	77.0	84.5	- 8.9
Slacks, incl. jean-cut casual slacks, total	232.3	232.2	--
Girls', sub-teen & teenage	87.3	92.9	- 6.0
Children's & infants'	145.0	139.3	+ 4.1
Jeans & dungarees, total	207.7	195.4	+ 6.3
Girls', sub-teen & teenage	91.8	76.6	+ 19.8
Children's & infants'	115.9	118.8	- 2.4
Shorts, total	84.6	75.4	+ 12.2
Girls', sub-teen & teenage	37.6	29.5	+ 27.4
Children's & infants'	47.0	45.9	+ 2.4
Playgarments, incl. playsuits & haltertops, total	390.9	367.2	+ 6.4
Girls', sub-teen & teenage	15.8	15.4	+ 2.6
Children's	119.2	95.4	+ 24.9
Infants' & toddlers'	255.9	256.4	- 0.2
Swimsuits	46.8	50.0	- 6.4
Panties, incl. pettipants, total	87.3	89.5	- 2.5
Girls' & children's	60.0	62.1	- 3.4
Infants' & toddlers'	27.3	27.4	- 0.4

(continued)

VALUE OF PRODUCT SHIPMENTS

Children's & Girls's Wear

Shipments of Specified Types of Children's & Girls' Wear--1982, 1983
(Value in Millions of Dollars)
(continued)

	1983	1982	% Change 1983/1982
Slips, vests & undershirts, total	$ 78.6	$72.3	+ 8.7%
Girls' & children's	30.8	29.5	+ 4.4
Infants' & toddlers'	47.8	42.8	- 11.7
Nightgowns, total	84.5	75.9	+ 11.3
Girls' & children's	56.0	53.3	+ 5.1
Infants' & toddlers'	28.5	22.6	+ 26.1
Pajamas, incl. heavyweight sleeping garments with feet, total	224.3	202.3	+ 10.9
Girls' & children's	66.1	58.1	+ 13.8
Infants' & toddlers'	158.2	144.2	+ 9.7
Robes, total	16.8	17.1	- 1.7

na not available

* Hosiery and accessories such as hats, scarves, gloves, neckwear, etc., furs, and leather outerwear are not included as these items are not covered in Census Bureau CIR's.

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Women's & Children's Outerwear MA-23F(83)-1,
Underwear & Nightwear MA-23G(83)-1.

Boys' Wear

Shipments of Specified Types of Boys' Wear--1982, 1983
(Value in Millions of Dollars)

	1983	1982	% Change 1983/1982
Boys' wear, total of specified categories*	$1,881.6	$1,813.1	+ 3.8%
Suits, including casual & uniform	71.9	83.3	- 13.7
Overcoats, topcoats, & tailored suburban & car coats, including uniform	9.9	9.0	+ 10.0
Tailored suit-type dress & sport coats, including uniform	49.9	48.6	+ 1.8
Casual (nontailored) sport coats & jackets			
Separate vests, excluding sweater vests	1.3	1.9	- 31.6

(continued)

VALUE OF PRODUCT SHIPMENTS

Boys' Wear

Shipments of Specified Types of Boys' Wear--1982, 1983
(Value in Millions of Dollars)
(continued)

	1983	1982	% Change 1983/1982
Boys' wear, total of specified categories* (cont'd.)			
Dress shirts, including uniform	$ 48.4	$ 56.5	- 14.3%
Woven sport shirts	73.5	89.7	- 18.1
Knit sport shirts, except sweatshirts	474.1	410.2	+ 15.6
Sweaters including sweater vests, knit cardigans & pullovers	25.0	25.3	- 1.2
Separate dress & sport trousers, including uniform	106.3	100.7	+ 5.6
Jeans & dungarees	560.9	487.3	+ 15.1
Jean-cut casual slacks	142.0	137.4	+ 3.3
Shorts, except athletic shorts	20.4	23.9	- 14.6
Nontailored heavy outer jackets except ski	40.6	44.8	- 9.4
Nontailored light outer jackets	40.1	45.3	- 11.5
Coveralls, overalls, work pants & jumpsuits	35.3	29.4	+ 20.1
Pajamas & other nightwear, excluding robes	63.4	68.4	- 7.3
Lightweight undershirts with 1/4 sleeve, excluding T-shirts made for outerwear	44.3	65.7	- 32.6
Supporter-type knit briefs	74.7	85.2	- 12.3

* Hosiery and accessories, such as hats, scarves, gloves, neckwear, leather outerwear, etc., are not included as these items are not covered by the Commerce Department's Apparel report. As previously noted, other items not included above are combined with men's wear and are covered in pertinent men's wear Fact Files.

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Men's & Boys' Outerwear, MA23E(83)-1,
Underwear & Nightwear, MA23G(83)-1.

PRODUCER PRICES

Producer (factory) prices for girls', children's & infants' wear rose 2.6% from 1963 to 1984, higher than the reported increases for all items and for all apparel items. Boys' wear producer prices for jeans and casual slacks had relatively small increases, though these increases were higher than those from 1982 to 1983.

Producer Price Indexes For Children's Wear 1981-1984
(12/77 = 100 unless otherwise noted)

	Annual Averages				% Change
	1984	1983	1982	1981	1984/1983
All items (1967 = 100)	310.3	303.1	299.3	293.4	+ 2.4%
All apparel (1967 = 100)	201.1	197.4	193.8	186.0	+ 1.9
Boys' wear					
Sport shirts	na	na	143.0	144.1	--
Denim jeans & jean-cut casual slacks (12/81 = 100)	103.8	102.1	100.5	na	+ 1.7
Jeans & jean-cut casual slacks of other fabrics (12/81 = 100)	100.9	99.5	99.2	na	+ 1.4
Work clothing, exc. jeans & work shirts (12/81 = 100)	na	102.9	99.9	na	--
Girls', children's & infants' wear (1967 = 100)	202.7	197.5	196.6	190.8	+ 2.6
Children's sport shirts	na	na	151.8	144.1	--
Children's dresses	na	na	116.1	117.3	--
Knee socks	na	140.5	137.3	131.4	--

na not available

Source: U.S. Bureau of Labor Statistics.

FOREIGN TRADE

Imports

The U.S. Bureau of the Census does not distinguish children's wear import data from totals recorded for all women's and men's wear products. The combined values are covered in specific women's wear Fact Files.

Exports

Value of Children's Wear Exports--1981-1984
(In Millions of Dollars)

	1984(e)	1983	1982	1981	% Change 1984/1983
Children's Dresses & Blouses (SIC 2361)	$10.7	14.4	14.1	20.6	- 25.7%
Children's Coats & Suits (SIC 2363)	$ 6.6	2.7	1.5	2.1	+144.4

(e) estimated

Source: U.S. Department of Commerce, International Trade Administration, 1985 U.S. Industrial Outlook.

THE SIZE OF THE MARKET

Births

The decade of the 1980's has witnessed a consistently high level in the number of births. This is a by-product of the big baby-boom (1946-1965), as women born in that period become mothers themselves. Though far short of the record number of births in one year--some 4.3 million in 1957--the birth total of around 3.6 million each year since 1980 is considerable. The Census Bureau has forecasted a peak birthrate of 3.9 million by the end of the decade and then a sustained level of 3.7 million births a year into the early 1990's.

Beyond the sheer number of new arrivals that need to be clothed, a key element of consumer expenditures on children's wear is the very high percentage of this total that are the first children born to a household. The first born traditionally receives new clothes, new toys, etc., while later children accept hand-me-downs. One study reports that parents will spend as much as a third more on their first child than on the second.

And these new parents clearly have the money to indulge their children. With the trend toward waiting longer to have children, couples have a chance to establish their careers and, subsequently, achieve more earning power. In 1970, only 19% of women had their first child after age 25. By 1982, the rate had grown to 36% and has not, as yet, begun to taper off. The parents now doing the spending are, most likely, a two-income family. The well documented jump in the number of working mothers is marked by the fact that nearly half of all mothers return to work within one year of their child's birth.

Live Births in the U.S., Birth Rates & Fertility Rates, 1980-1984

Year	Number (thous.)	Birth Rate*	Fertility Rate**
1984(p)	3,697.0	15.7	66.0
1983(p)	3,614.0	15.5	65.4
1982	3,680.5	15.9	67.3
1981	3,629.2	15.8	67.4
1980	3,612.3	15.9	68.4

(p) provisional
* Live births per 1,000 population
** Live births per 1,000 women 15-44 years of age.

Source: U.S. Dept. of Health & Human Services, National Center for Health Statistics, Advance Report of Final Natality Statistics (Vol. 33, No. 6, Sept. 1984).

Total Youth Population

The spurt in the birthrate in recent years has swelled the nation's population of those under 5 years of age to 17.8 million in 1984, an 8.3% increase since 1980. As this segment of the population ages, reported declines in the population of the other children's age groupings will be erased.

THE SIZE OF THE MARKET

Total Youth Population

Trends In The Size of The Children's & Boys' Wear Markets, 1980, 1984
(Numbers in Thousands)

	1984	1980(r)	% of Total Population 1984	% of Total Population 1980	% Change 1984/1980
Total, 16 & younger	59,021	59,462	24.9%	26.1%	- 0.7%
Under 5 years	17,816	16,454	7.5	7.2	+ 8.3
5 to 9 years	16,351	16,601	6.9	7.3	- 1.5
10 to 14 years	17,567	18,241	7.4	8.0	- 3.7
15 to 16 years	7,287	8,166	3.1	3.6	- 10.8

(r) revised

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-25, No. 965 (March 1985)

Population projections by the Bureau of the Census indicate large growth in the number of 5 to 9 year olds by 1990 and in the number of 10 to 14 year olds by 1995. These groups will account for an increasing proportion of the U.S. population by the mid to late 1990's. By the turn of the century, the population of those under 5 years of age will have peaked as women of the baby-boom generation pass their prime childbearing years.

The U.S. Youth Population (Through Age 16)
Projections to 2000*

	Number (thousands) 1985	1990	1995	2000	% Change 2000/1985	Percent of Total Population 1985	1990	1995	2000
Total, all ages	238,631	249,657	259,559	267,955	+ 12.3%	100.0%	100.0%	100.0%	100.0%
Youth, 16 years & younger	59,271	61,026	63,816	63,603	+ 7.3	24.8	24.4	24.6	23.7
Male	30,313	31,219	32,650	32,544	+ 7.4	12.7	12.5	12.6	12.1
Female	28,956	29,807	31,167	31,056	+ 7.2	12.1	11.9	12.0	11.6
Under 5 years	18,453	19,198	18,615	17,626	- 4.5	7.7	7.7	7.2	6.0
Male	9,444	9,827	9,529	9,022	- 4.5	4.0	3.9	3.7	3.4
Female	9,009	9,371	9,086	8,604	- 4.5	3.8	3.7	3.5	3.2
5 to 9 years	16,611	18,591	19,337	18,758	+ 12.9	7.0	7.4	7.5	7.0
Male	8,493	9,511	9,895	9,599	+ 13.0	3.6	3.8	3.8	3.6
Female	8,117	9,080	9,443	9,159	+ 12.8	3.4	3.6	3.6	3.4

(continued)

THE SIZE OF THE MARKET

Total Youth Population

The U.S. Youth Population (Through Age 16)
Projections to 2000*
(continued)

	Number (thousands)				% Change	Population			
	1985	1990	1995	2000	2000/1985	1985	1990	1995	2000
10 to 14 years	16,797	16,793	18,772	19,519	+ 16.2	7.0	6.7	7.2	7.3
Male	8,590	8,586	9,602	9,986	+ 16.2	3.6	3.4	3.7	3.7
Female	8,207	8,207	9,170	9,532	+ 16.1	3.4	3.3	3.5	3.6
15 & 16 years	7,410	6,444	7,092	7,700	+ 3.9	3.1	2.6	2.7	2.9
Male	3,786	3,295	3,624	3,937	+ 4.0	1.6	1.3	1.4	1.5
Female	3,623	3,149	3,468	3,761	+ 3.8	1.5	1.3	1.3	1.4

* Representing the middle in a series of three projections compiled by the Census Bureau, based on varying assumptions on future trends in fertility, mortality and immigration.

Source: U.S. Bureau of the Census,
Current Population Reports, Series P-25,
No. 952 (May 1984).

The Youth Population of the U.S.
By Single Years of Age & By Sex, 1984 & 1990
(Numbers in Thousands)

	1984 Total			1990 Total*		
	Total	Male	Female	Total	Male	Female
Youth, 16 years & younger, total	59,021	30,201	28,821	61,026	31,219	29,807
Under 5 years	17,816	9,115	8,702	19,198	9,827	9,371
Under 1 year	3,637	1,861	1,775	3,832	1,962	1,870
1 year	3,547	1,817	1,730	3,847	1,969	1,878
2 years	3,542	1,811	1,731	3,851	1,971	1,880
3 years	3,556	1,818	1,738	3,843	1,967	1,876
4 years	3,535	1,808	1,727	3,825	1,957	1,867
5 to 9 years	16,351	8,367	7,984	18,591	9,511	9,080
5 years	3,403	1,739	1,664	3,797	1,943	1,854
6 years	3,299	1,687	1,612	3,761	1,924	1,836
7 years	3,334	1,707	1,626	3,717	1,902	1,815
8 years	3,085	1,579	1,506	3,681	1,882	1,799
9 years	3,230	1,654	1,576	3,635	1,860	1,776

(continued)

THE SIZE OF THE MARKET

Total Youth Population

The Youth Population of the U.S.
By Single Years of Age & By Sex, 1984 & 1990
(Numbers in Thousands)
(continued)

	1984 Total			1990 Total*		
	Total	Male	Female	Total	Male	Female
10 to 14 years	17,567	8,994	8,573	16,793	8,586	8,207
10 years	3,230	1,656	1,575	3,610	1,845	1,765
11 years	3,286	1,681	1,606	3,409	1,743	1,665
12 years	3,481	1,955	1,701	3,281	1,677	1,604
13 years	3,817	1,955	1,862	3,299	1,687	1,611
14 years	2,752	1,923	1,830	3,195	1,633	1,562
15 & 16 years	7,287	3,725	3,562	6,444	3,295	3,149
15 years	3,684	1,884	1,801	3,257	1,666	1,591
16 years	3,603	1,841	1,761	3,187	1,629	1,558

* Middle series projections.

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-25, No. 952 (May 1984),
No. 965 (March 1985).

Youth Population of the U.S. by Size of Family: 1980 & 1983
(Numbers in Thousands)

	1983	1980	% Change 1983/1980	% of Total 1983
All families, total	61,393	58,426	+ 5.1%	100.0%
No children under 18	30,575	27,909	+ 9.5	49.8
With children under 18	30,812	30,517	+ 1.0	50.2
1 child under 18	12,854	12,231	+ 5.1	20.9
2 children under 18	11,470	11,280	+ 1.7	18.7
3 or more children under 18	6,494	7,006	- 7.3	10.6
No children under 6	47,593	45,303	+ 5.0	77.5
With children under 6	13,800	13,121	+ 5.2	22.5
1 child under 6	9,477	9,193	+ 3.1	15.4
2 children under 6	3,690	3,363	+ 9.7	6.0
3 or more children under 6	634	565	+ 12.2	1.0
No children under 3	53,061	50,500	+ 5.1	86.4
With children under 3	8,332	7,926	+ 5.1	13.6
1 child under 3	7,252	7,016	+ 3.4	11.8
2 children under 3	1,043	876	+ 19.1	1.7
3 or more children under 3	37	33	+ 12.1	0.06

Source: U.S. Bureau of the Census,
Current Population Reports, Series P-20,
No. 366 (September 1981) and No. 388 (May 1984)

THE SIZE OF THE MARKET

Total Youth Population

Children Under 18 Years of Age (Boys & Girls)
By Type of Family & Employment
Status of Mother

	Age 6 to 17	Under 6
Total children under 18*	100.0%	100.0%
Mother in labor force	60.3	48.2
In married couple families	77.5	82.5
Mother in labor force	46.4	40.4
Mother not in labor force	31.1	42.1
In families maintained by women (divorced, single, etc.)	20.3	15.6
Mother in labor force	13.9	7.9
Employed	11.9	6.2
Not employed	2.0	1.7
Mother not in labor force	6.4	7.7
In families maintained by men (divorced, single, etc.)	2.2	1.9

* Defined as "own" children. Excluded are grandchildren, nieces, cousins, etc. and unrelated children.

Source: Bureau of Labor Statistics data for March 1984.

Families with Children Under 18 Years of Age (Boys & Girls)
By Number of Children & Number of Earners

		Number of Children Under 18			
	Total	One	Two	Three	Four or More
Total families (000)	31,426	13,126	11,860	4,480	1,960
Percent	100.0	100.0	100.0	100.0	100.0
With no earners	7.7	6.8	6.9	8.7	16.2
With one earner	35.9	33.4	36.8	39.0	39.7
With two or more earners	56.4	59.8	56.3	52.3	44.1
Percent of families by number of children under 18	100.0	41.8	37.7	14.3	6.2

Source: Bureau of Labor Statistics data for March 1984

THE SIZE OF THE MARKET

School Enrollment

The jump in the rate of school enrollment, particularly among younger children, offers retailers a very attractive market, both in terms of numbers and in buying power. Back-to-school purchases are an essential element in contributing to the financial health of the children's wear industry. Therefore, changes in the pattern of school enrollment are watched rather carefully.

Not only do younger children represent a larger share of the entire children's wear market now than in past years, but the number of little boys and girls being outfitted for school has risen significantly over the past decade. For example, nearly 37% of little girls 3-4 years old--over 1.3 million--will be enrolled in nursery school, up from 35.5% in 1980 and 32.1% in 1975. The 1970 enrollment was less than 20%. And, as was discussed in detail in the section on Births, the parents of these children have the money and the inclination to see that their children go to school well clothed.

Percentages of Children 3 to 17 Years Old Enrolled in School, 1975, 1980-1983

	1983	1982	1981	1980	1975
Children, 3-17 years					
3-4 years	37.5%	36.4%	36.0%	36.7%	31.5%
5-6 years	95.4	95.0	94.0	95.7	94.7
7-13 years	99.2	99.2	99.2	99.3	99.3
14-17 years	95.0	94.4	94.1	93.4	93.6
Boys, 3-17 years					
3-4 years	38.1%	36.4%	36.8%	37.8%	30.9%
5-6 years	95.1	94.7	94.2	95.0	94.4
7-13 years	99.1	99.1	99.1	99.2	99.0
14-17 years	95.1	94.9	94.3	93.7	94.6
Girls, 3-17 years					
3-4 years	36.9%	36.4%	35.2%	35.5%	32.1%
5-6 years	95.8	95.3	93.8	96.4	95.1
7-13 years	99.3	99.3	99.4	99.3	99.6
14-17 years	94.9	94.0	93.9	93.1	92.6

Source: U.S. Bureau of the Census, Current Population Reports, Series P-20, No. 394 (October 1984)

THE SIZE OF THE MARKET

Youth Population by Region

The West will be the fastest growing region of the country in youth population (as well as total population) for the rest of the century, based on projections issued by the Census Bureau. This region leads in growth from 1980 to 2000 for all five youth population age brackets. Growth is forecast at 33.5% for under 5 year olds, 48.1% for 5 to 9 year olds, 40.3% for 10 to 14 year olds, 16.3% for 15 to 19 year olds and 33.6% for all those 19 years old and younger.

The South, while second to the West in terms of growth, leads the way in sheer numbers. There are more of all five youth groups in the South, both presently and, it is projected, through 2000. This region alone accounts for more than a third of the U.S. youth population. The Northeast and North Central regions will have diminishing shares of the market, yet the North Central will still maintain a significant proportion.

Projections of the U.S. Youth Population by Region: 1980 to 2000
(In Thousands)

	Total Population	Under 5 Years	5 to 9 Years	10 to 14 Years	15 to 19 Years	19 & Younger Total	19 & Younger % by Region
1980							
U.S. Total	226,505	16,344	16,697	18,241	21,162	72,444	100.0%
Northeast	49,137	3,103	3,330	3,950	4,523	14,906	20.6
North Central	58,854	4,379	4,427	4,803	5,606	19,215	26.5
South	75,349	5,540	5,778	6,133	7,118	24,569	33.9
West	43,165	3,322	3,161	3,355	3,915	13,753	19.0
1990							
U.S. Total	249,203	19,200	18,599	16,776	16,895	71,470	100.0%
Northeast	48,423	3,296	3,155	2,990	3,142	12,583	17.6
North Central	60,265	4,786	4,635	4,207	4,161	17,789	24.9
South	87,594	6,736	6,553	5,967	6,179	25,435	35.6
West	52,920	4,382	4,256	3,612	3,413	15,663	21.9
2000							
U.S. Total	267,462	17,624	18,757	19,519	18,888	74,788	100.0%
Northeast	46,401	2,661	2,888	3,127	2,979	11,655	15.6
North Central	59,714	4,035	4,302	4,519	4,344	17,200	23.0
South	98,828	6,491	6,886	7,166	7,009	27,552	36.8
West	62,519	4,436	4,682	4,706	4,555	18,379	24.6

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-25, No. 937.

RETAIL SALES

The children's wear market, buoyed by the favorable demographic developments mentioned in the preceding section, and by the overall strength of the U.S. economy, has experienced a resurgence at the retail level. Consumer expenditures rose 10.1% in 1984 from the year before. This trend has continued into 1985. A national survey by Women's Wear Daily (April 22, 1985) reports strong children's wear sales activity for March and promising results for April as well. March increases ranged up to 30% for New York area stores and up to 20% for West Coast outlets. Dress sales, particularly upscale styles, led the way.

The U.S. Department of Agriculture has conservatively estimated the total costs of what a family will spend to raise a child through the first five years at $21,041. Housing, of course, is the largest component but clothing expenses are considerable. Clothing sales, in fact, are projected as the fastest growing segment of the children's market, perhaps more than doubling within five years.

In 1983, sales of preschool apparel hit record highs, increasing by about 15%. The high end of this market continues to do well, in spite of aggressive price competition by retailers, partly as a result of the large number of gift purchases. Apparel remains the most important back-to-school category by far, accounting for 56% of such purchases in 1984. Sales of apparel for older children has been less stable, reflecting the mixed results that adult designers have encountered when entering the children's wear market.

RETAIL SALES BY STORE TYPE

Today's parents, with the capability of spending more on their children than their parents spent on them, are encountering "everyday low price" promotional programs by retailers as the stores strive to maintain their market shares. The continued spread of off-price outlets is having a ripple effect throughout the industry as more traditional children's wear retailers cut their margins to remain price competitive.

Perhaps the best known of the off-pricers is Kids "R" Us, which started out with two stores in 1983, added eight more in 1984, and will open about 15 more in 1985. The formula that has enabled this chain to become a marketing force in the New York-New Jersey-Philadelphia area is basic: provide a wide selection, maintain a deep inventory, and sell at a discount. Having a large assortment is a necessity as today's parents tend to have less time to spend their two incomes. A store that can offer many types of brand-name apparel classifications in a variety of sizes, as well as accessories such as costume jewelry, bags and hats, has an important advantage.

The following tables, much of it based on preliminary data from the 1982 census of retail trade, show developments in children's wear retailing since the last census in 1977. Information on sales by merchandise line will not be released by the Census Bureau until late 1985. However, data collected through other sources, including consumer panel operations, cover this subject in the Buying Habits section of this Fact File.

In the census reports, each store location is separately counted, regardless of ownership. (Company information will be released by the Census Bureau at a later date). Leased departments are counted as separate stores.

RETAIL SALES BY STORE TYPE

Children's & Infants' Wear Stores

Preliminary figures from the 1982 census of retail trade indicate growth in the number of children's and infants' wear stores, their sales and their annual payrolls. The inflation that has occurred over the 1977-1982 period should be considered as an important factor when making such comparisons.

Children's & Infants' Wear Stores, 1977, 1982
(Includes only stores with payrolls)

	1982	1977(r)	% Change 1982/1977
Number of stores*	5,323	4,367	+ 21.9%
Sales (mil. $)	$1,367.9	$ 708.0	+ 93.2
Annual payroll (mil. $)	173.6	98.8	+ 75.7

(r) revised

Source: U.S. Bureau of the Census, 1982 Census of Retail Trade (Preliminary), RC82-SUM-1(P).

Apparel Specialty Stores

Preliminary figures in the 1982 Census of Retail Trade show the extent to which infants', toddlers', girls' and boys' wear items are sold in apparel specialty stores, in particular women's ready-to-wear stores, family clothing stores, and men's and boys' clothing and furnishings stores. The following show trends in these store types compared with the previous census in 1977. Data is in current dollars, not adjusted for price changes over this period.

Women's Ready-To-Wear Stores, 1977, 1982
(Includes only stores with payroll)

	1982	1977(r)	% Change 1982/1977
Number of stores*	44,084	40,227	+ 9.6%
Total sales (mil. $)	$20,310.8	$12,343.7	+ 64.5
Infants', toddlers', girls' & subteen clothing & accessories sales (mil. $)	$ 385.9	$ 419.7	- 8.1
% of total store sales	1.9%	3.4%	--

(r) revised

RETAIL SALES BY STORE TYPE

Apparel Specialty Stores

Family Clothing Stores, 1977, 1982
(Includes only stores with payroll)

	1982	1977(r)	% Change 1982/1977
Number of stores*	17,899	16,025	+ 11.7%
Total sales (mil. $)	$13,471.4	$ 7,801.0	+ 72.7
Infants', toddlers', girls' & subteen clothing & accessories sales (mil. $)	$ 781.3	$ 507.1	+ 54.1
% of total store sales	5.8%	6.5%	--
Boys' & young men's wear & accessories sales (mil. $)	$ 673.6	$ 436.9	+ 54.2
% of total store sales	5.0%	5.6%	--

(r) revised

Men's & Boys' Clothing & Furnishings Stores, 1977, 1982
(Includes only stores with payroll)

	1982	1977(r)	% Change 1982/1977
Number of stores*	17,426	21,093	- 17.4%
Total sales (mil. $)	$ 7,685.8	$ 6,937.1	+ 10.8
Boys' & young men's wear & accessories sales (mil. $)	307.4	388.5	- 20.9
% of total store sales	4.0%	5.6%	--

(r) revised

Source for previous three tables: U.S. Bureau of the Census, 1982 Census of Retail Trade (Preliminary), RC82-I-15, 16, 17(P).

Department Stores

The Department of Commerce estimates that department store sales reached $129.3 billion in 1984, a gain of 10.9% from the year before. The latest count on the actual number of department stores (including discount department stores) nationally is contained in the 1982 census of retail trade. It indicates that there are 10,035 establishments, an increase of 13.9% from the 1977 census. Figures from the 1982 census showing sales for merchandise lines of children's wear have not yet been released. The previous census has department stores accounting for 64.2% of infants' and toddlers' wear sales, 63.9% of girls' and subteens' wear sales, and 70.2% of boys' wear sales (dollar volume).

RETAIL SALES BY STORE TYPE

Department Stores

Merchandising & Operating Results of Girls' Wear Departments
In Department Stores With Total Annual Sales Over $1 Million, 1983
(Typical Results)

	Girls' Clothing By Size Group				
	3 to 6X	7 to 14	6 to 16 or 8 to 14	Apparel Accessories	Intimate Apparel
Net sales, % change from last year	+ 12.9%	+ 5.7%	- 4.3%	+ 9.5%	+ 1.1%
Sales, % of merchandise division	7.1	14.3	4.7	7.0	4.0
Sales, % of total store sales	0.5	1.0	0.3	0.6	0.3
$ sales per square foot of selling space	$ 92.0	$101.0	$ 65.0	$111.8	$ 64.0
Cumulative markon %	51.2%	51.2%	51.2%	51.2%	51.1%
Gross margin, % of sales (incl. cash discounts)	44.1	43.6	40.9	45.3	45.2
Markdowns, retail, % of sales	20.4	20.4	25.6	12.0	15.4
Returns, % of sales	9.9	9.4	10.6	3.5	4.3
Number of stock turns	3.9	3.8	2.9	2.7	2.6
Salespeople's salaries, % of sales	7.5	7.7	7.5	7.5	7.4
Sales promotion costs, % of sales	3.9	3.2	3.0	2.6	4.1

Merchandising & Operating Results of Boys' Wear Departments
In Department Stores With Total Annual Sales Over $1 Million, 1983
(Typical Results)

	Boys' Clothing By Size Group			
	Size 2 to 6X or 8	4 to 12 or 4 to 16	13 to 20 & 32 to 44	Boys' Furnishings (All Ages)
Net sales, % change from last year	+ 11.2%	+ 3.5%	+ 8.8%	+ 6.4%
Sales, % of merchandise division	6.6	14.6	23.3	13.0
Sales, % of total store sales	0.5	1.2	2.2	0.9
$ sales per square foot of selling space	$ 81.7	$ 96.8	$121.0	$ 103.1
Cumulative markon %	49.9%	48.8%	47.5%	49.9%
Gross margin, % of sales (incl. cash discounts)	42.5	38.2	37.7	43.7
Markdowns, retail, % of sales	17.7	18.1	15.7	14.3
Returns, % of sales	8.3	9.7	10.4	7.1
Number of stock turns	3.2	2.6	3.2	2.8
Salespeople's salaries, % of sales	7.4	7.9	5.8	7.2
Sales promotion costs, % of sales	3.2	2.8	2.7	3.8

Source: National Retail Merchants Association, Merchandising and Operating Results of 1983, (1984 Edition).

RETAIL SALES BY STORE TYPE

Seasonal Pattern

Percent of Households Purchasing Infants' & Children's Wear by Month

Month	Infants' Wear Girls'	Infants' Wear Boys'	Girls' Wear	Boys' Wear
January	2.0%	1.8%	11.9%	12.0%
February	1.8	1.3	10.3	10.7
March	2.0	1.9	12.7	12.9
April	2.1	1.7	13.6	13.8
May	1.7	1.7	12.4	11.9
June	1.6	1.5	11.9	12.5
July	1.9	1.5	14.0	13.9
August	1.8	1.7	15.5	18.6
September	1.7	1.6	12.7	13.6
October	2.6	2.4	12.7	13.8
November	2.4	2.0	15.0	15.0
December	2.8	2.7	17.2	19.7
In average month	2.0	1.8	14.4	14.0

Source: Newspaper Advertising Bureau, 1985 Newspaper Advertising Planbook

RETAIL ADVERTISING

Monthly Distribution of Retailers' Newspaper Advertising Linage, 1982

	Girls' Sportswear & Accessories	Boys' Outer Apparel	Girls' & Teens' Dresses
January	4.0%	3.0%	2.2%
February	6.6	6.5	2.8
March	7.3	12.1	22.9
April	6.8	8.1	15.4
May	7.9	3.0	8.1
June	4.6	1.5	2.5
July	8.7	6.8	5.2
August	23.3	28.2	19.8
September	6.0	5.6	2.8
October	7.2	8.3	2.5
November	8.0	8.0	4.6
December	9.6	8.9	11.2
Total linage	100.0	100.0	100.0

Source: The Advertising Checking Bureau, 1982, 1985 Newspaper Advertising Planbook.

CONSUMER PRICE TRENDS

Consumer prices for all specified children's wear categories, with one exception, registered smaller price gains in 1984 than the rate recorded for all items. Only the boys' coats, jackets, sweaters, and shirts group had an increase (5.4%) higher than that of the all item category (4.3%).

The total apparel group had a price increase of 1.3% for 1984 at the consumer level. All girls' apparel categories fell below this rate, with prices for girls' separates and sportswear actually declining for the year. Prices for infants' and toddlers' apparel rose only slightly above that for total apparel. The boys' apparel category rose 1.7% as a whole, but had one declining category-- boys' suits, trousers, sport coats, and jackets.

Consumer Price Indexes For Children's Wear, 1981-1984
(Dec. 1977 = 100, unless otherwise indicated)

	Annual Averages				% Change
	1984	1983	1982	1981	1984/1983
All items (1967=100)	311.1	298.4	289.1	272.4	+ 4.3%
All apparel commodities (1967=100)	187.0	184.5	181.0	177.7	+ 1.3
Boys' apparel	125.1	123.0	118.8	115.3	+ 1.7
Coats, jackets, sweaters, & shirts	122.0	115.7	110.6	108.4	+ 5.4
Furnishings	136.9	135.0	131.0	123.3	+ 1.4
Suits, trousers, sport coats & jackets	122.9	124.0	120.3	117.5	- 0.9
Girls' apparel	108.1	108.1	107.1	107.1	--
Coats, jackets, dresses, & suits	100.7	99.8	99.2	100.5	+ 0.9
Separates & sportswear	103.6	104.8	105.4	107.6	- 1.1
Underwear, nightwear, hosiery & accessories	128.7	127.9	123.4	117.0	+ 0.6
Infants' & toddlers' apparel (1967 = 100)	287.0	282.7	269.4	259.8	+ 1.5

Source: U.S. Department of Labor, Bureau of Labor Statistics.

CONSUMER BUYING HABITS

Sales trends reported by MRCA Information Services show a small increase in units of apparel purchased for girls under 16 years of age during the third quarter of 1984 as compared with the same 1983 period. Conversely, dollar outlays for apparel during the three months was somewhat lower, indicating a preference by consumers for taking advantage of the many promotional opportunities available to them. The information is based on the findings of continuous tracking studies by MRCA among 11,500 nationally representative U.S. households.

Consumer Purchases of Apparel for Girls Under 16 Years of Age
July-September 1983 & 1984

	% Change 1984/1983	
	Units	Dollars
Outerwear (coats, jackets)	+ 6.8%	- 3.2%
Dresses	+13.1	+10.8
Skirts	+ 1.1	-11.7
Pants	+21.9	+13.7
Jeans	- 5.2	- 2.6
Shorts	+27.7	+25.8
Blouses, shirts	- 3.5	- 9.4
Sweaters	-11.1	-10.1
Underwear	- 3.8	- 0.6
Sleepwear, robes	+ 3.7	+ 3.9
Legwear	+ 0.2	- 1.1
Accessories (incl. separate vests)	+ 5.8	+ 8.3
Total	+ 0.4	- 2.0

Source: MRCA Information Services,
(Women's Wear Daily, March 1[illegible], 1985).

In August 1984, the Gallup Organization conducted a nationwide survey among 11-14 year old boys and girls. The purpose was to ascertain the group's attitudes regarding apparel purchasing. The survey, undertaken for Apparel Merchandising, reflects key distinctions in purchasing habits depending on sex and age.

Ranking of Important Factors In Buying Apparel

Factor determining purchase	Sex of Respondent		Age of Respondent (both sexes)			
	Boys	Girls	Age 11	Age 12	Age 13	Age 14
Style	32.9%	29.7%	26.3%	26.5%	35.2%	38.5%
Price	20.5	22.5	23.2	23.6	22.9	16.3
Fit	15.7	21.1	17.2	25.5	9.5	21.2
Comfort	12.9	14.4	19.2	8.2	19.0	8.7
Quality	8.1	6.2	7.1	6.4	7.6	7.7
Color	4.3	0.5	2.0	5.5	1.0	--
Brand name	4.3	5.7	6.1	4.5	3.8	7.7
All	0.5	--	--	--	1.0	--
None	1.0	--	--	1.8	--	--

Note: Totals add to more than 100% due to multiple respones.

Source: The Gallup Organization (Apparel Merchandising, November 1984).

Ranking of Considerations About Apparel Fit

Problems with fit	Sex of Respondent		Age of Respondent (both sexes)			
	Boys	Girls	Age 11	Age 12	Age 13	Age 14
Not available in size	23.8%	30.1%	28.8%	33.3%	29.2%	15.8%
Clothes are too small	24.6	11.2	21.2	17.9	16.7	12.3
Clothes are too big	13.8	20.3	19.7	16.7	11.1	21.1
Clothes are too short	9.2	18.9	13.6	14.1	13.9	15.8
Clothes are too long	8.5	16.8	16.7	9.0	9.7	17.5
Clothes may shrink	0.8	--	--	--	--	1.8
Other	23.1	25.9	15.2	23.1	40.2	19.3

Note: Totals add to more than 100% due to multiple responses.

Source: The Gallup Organization (Apparel Merchandising, November 1984).

An analysis of the trend in consumer purchases of children's wear, based on information compiled by the Market Research Corporation of America, has been reported by Kurt Salmon Associates in its Soft Goods Outlook for 1985.

Percentage Change In Units of Children's Wear Purchased by Consumers, 1981-1985

	Projected 1985/1984	1984/1983	1983/1982	1982/1981
Boys' Wear				
(ages 15 & under)	--	- 1.1%	+ 0.1%	- 4.0%
Non-tailored outerwear	--	6.0	+ 16.0	- 6.0
Woven sport shirts	+ 5.0%	- 9.0	- 5.0	- 20.0
Knit sport shirts	- 2.0	- 2.0	- 2.0	+ 3.0
Slacks	+ 15.0	+ 30.0	+ 5.0	- 10.0
Jeans	- 5.0	- 5.0	- 10.0	- 5.0
Underwear	--	- 4.0	+ 1.0	- 3.0
Girls' Wear				
(ages 15 & under)	+ 1.0	+ 1.4	+ 4.0	- 3.0
Non-tailored outerwear	- 5.0	- 19.0	+ 20.0	+ 6.0
Dresses	+ 4.0	+ 9.0	- 1.0	- 3.0
Blouses & shirts	--	- 2.0	+ 3.0	- 2.0
Slacks	+ 12.0	+ 18.0	- 3.0	+ 2.0
Jeans	- 5.0	- 3.0	- 9.0	- 14.0
Nightwear	--	+ 4.0	+ 2.0	- 2.0

Source: Kurt Salmon Associates, Soft Goods Outlook for 1985.

CONSUMER BUYING HABITS

Children's/Infants' Wear

From 1981 to 1983, there has been a discernable shift in the unit movement of children's and infants' wear, based upon research by Chain Store Age. The decline of variety store sales has led to somewhat larger slices of the market for other store types.

Market Share by Units, 1981-1983

Store Types	1983	1982	1981
Big 3 (Sears, Penney, Ward)	22.3%	21.2%	20.5%
Specialty stores	21.0	22.2	21.9
Discount stores	19.5	17.7	17.4
Department stores	18.0	18.7	2.5
Mail-order catalog	13.0	13.8	13.5
Variety stores	2.2	2.3	19.1
Others	4.0	4.1	5.1

Source: Chain Store Age, July 1982, 1983, 1984.

Boys' & Girls' Wear

Information on purchase patterns for boys' and girls' wear for 1982 has been supplied by NPD Special Industry Services, one of the NPD Group of Marketing & Research Companies, Port Washington, New York. The data is based on reports from an on-going monthly panel diary tracking the purchases of 6,500 nationally representative families.
(Note: The "boys" classification covers boys 16 years and younger, while the "girls" classification covers girls 13 years and younger.)

Boys' Wear

Distribution of Reported Boys' Wear Purchases by Type of Retail Outlet, 1982
(Percent of Units Purchased)

	Sport Coats	Suits
National chains	28.0%	44.5%
Department stores	31.5	20.8
Discount stores, incl. K mart	19.4	19.4
Specialty stores	11.6	13.9
Other store types	9.5	1.5

Source: NPD Special Industry Services, Inc.

CONSUMER BUYING HABITS

Boys' Wear

Distribution of Boys' Coat Purchases by Type of Outlet, 1982
(Percent of Units Purchased)

	Jackets	All-Weather Coats	Raincoats
National chains	28.2%	28.4%	31.2%
Department stores	18.3	12.1	15.0
Discount stores & K mart	31.4	28.0	33.0
Specialty stores	11.3	22.7	5.4
Other store types	10.8	8.8	15.4

Distribution of Boys' Pants Purchases by Store Type 1982
(Percent of Units Purchased)

	Corduroy Jeans	Denim Jeans	Corduroy Slacks	Non-corduroy Slacks
National chains	25.6%	31.0%	24.4%	24.8%
Department stores	22.9	17.0	18.8	22.8
Discounters, incl. K mart	18.8	30.4	32.4	29.7
Specialty stores	23.6	13.4	19.6	16.3
Other store types	8.2	8.2	4.8	6.4

Distribution of Boys' Underwear/Loungewear Purchases by Store Type, 1982
(Percent of Units Purchased)

	Undershorts	Undershirts	Pajamas/ Sleepwear Sets	Robes
National chains	26.4%	26.4%	38.5%	35.5%
Department stores	13.8	11.0	16.2	17.2
Discounters, incl. K mart	43.1	43.2	33.6	39.1
Specialty stores	4.1	6.2	5.7	5.1
Other store types	12.6	13.2	6.0	3.1

Distribution of Boys' Shirt/Sweater Purchases by Store Type, 1982
(Percent of Units Purchased)

	Sweatshirts	Polo Shirts	Sport Shirts	Dress Shirts	Sweaters
National chains	21.2%	23.8%	25.3%	23.7%	21.8%
Department stores	16.6	19.9	20.7	18.4	28.2
Discount store, incl. K mart	42.1	34.0	33.4	36.1	29.1
Specialty stores	9.2	11.9	11.2	13.0	12.0
Other store types	10.9	10.4	9.4	8.8	8.9

Source: NPD Special Industry Services, Inc.

CONSUMER BUYING HABITS

Girls' Wear

Distribution of Girls' Dress/Skirt Purchases by Store Type, 1982
(Percent of Units Purchased)

	Dresses	Skirts
National chains	16.9%	24.0%
Department stores	32.6	22.1
Discount stores, incl. K mart	25.2	29.4
Specialty stores	17.5	17.5
Other store types	7.8	7.0

Distribution of Girls' Tops by Type of Outlet, 1982
(Percent of Units Purchased)

	Shirts/ Blouses	Other Tops	Sweatshirts	Sweaters
National chains	23.6%	28.5%	23.7%	21.9%
Department stores	21.6	19.2	14.6	23.1
Discount stores, incl. K mart	29.0	34.7	32.3	29.8
Specialty stores	18.6	14.4	14.8	17.5
Other store types	7.2	3.2	14.6	7.7

Distribution of Girls' Coat Purchases by Type of Outlet, 1982
(Percent of Units Purchased)

	Jackets	All Weather Coats	Raincoats
National chains	22.9%	19.0%	32.9%
Department stores	18.8	29.9	14.9
Discount stores, incl. K mart	34.1	39.5	29.5
Specialty stores	17.8	4.2	13.7
Other store types	6.4	7.4	9.0

Distribution of Girls' Purchases by Type of Outlet, 1982
(Percent of Units Purchased)

	Total Slacks	Corduroy Slacks	Non-corduroy Slacks	Denim Jeans	Corduroy Jeans
National chains	25.6%	25.2%	25.9%	22.1%	18.8%
Department stores	18.9	19.2	18.8	17.9	28.7
Discounters, incl. K mart	29.6	26.7	31.4	34.6	23.3
Specialty stores	19.5	21.5	18.3	17.0	23.1
Other store types	6.4	7.4	5.6	8.4	6.1

Source: NPD Special Industry Services, Inc.

CONSUMER BUYING HABITS

Girls' Wear

Distribution of Girls' Suit Purchases by Type of Outlet, 1982
(Percent of Units Purchased)

	Suits	Pantsuits
National chains	14.0%	18.1%
Department stores	36.3	16.9
Discount stores, incl. K mart	43.1	40.1
Specialty stores	6.5	16.7
Other store types	--	8.2

Source: NPD Special Industry Services, Inc.

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COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans. (August)

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age, personal income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and in retail sales by store types, and the outlook for consumer markets based on current economic trends. (1984 Edition available now--1985 Edition will be available in February, 1986)

DEPARTMENT STORE SALES: (Including selected major apparel specialty store sales) Covers sales of department stores, and the number of stores operated, listed by geographic region and state based on buying headquarter location. Also lists branch store sales, where available. Sale information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included. (1984 Edition available now--1985 Edition will be available in January, 1986)

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